

2003 OPEN ENROLLMENT CHECKLIST (PR-INTRO-5)

NOVEMBER 2002

VERSION (5.0)

2003 OPEN ENROLLMENT CHECKLIST

Following is list of steps and the corresponding documentation on how to setup and enter employees into the health insurance module for the 2003 Open Enrollment year.

NOTE: This document has not been updated to reflect GUI MUNIS.

Checklist for Setting Up Health Insurance

Each step below is described in more detail in the document **Setting Up Health Insurance (PR-ADM-7)**.

- ☐ 1. Verify the District Number in the MUNIS System Control Table.
- ☐ 2. Add vendor records. Districts that have new carriers offered in their county or surrounding counties will need to add new vendor records.
- ☐ 3. Set up Health Insurance Master Deduction Records. Districts that have new carriers offered in their county or surrounding counties will need to add new Master Deduction Records.
- ☐ 4. Verify that the primary pay frequency is correct on the Employee Master File for each employee.
- ☐ 5. Verify the Insurance Premium Maintenance table. A new rate table has been loaded for you, along with the appropriate External Rates (State Contribution).

NOTE: Last year's Insurance Premium Maintenance records have an effective date of 01/01/2002 and this year's Insurance Premium Maintenance records have an effective date of 01/01/2003. Make sure there are records having an effective date of 01/01/2003. You may want to perform a Find on an effective date of 01/01/2003.

- ☐ 6. Verify the Health Insurance Parameter File has been loaded. The **External Premium** is \$269.44 and the **Flex Calculate Amount** is \$234.00.

Information on Carrier Codes:

Additional carrier codes have been added to the MUNIS Health Insurance system to compensate for the Calendar Year 2003 four state contributions, which are known in MUNIS as; low **F** (\$269.44), **G** (\$278.76), **H** (\$292.00), and the Anthem BC/BS is **F** (\$397.08). All carriers except Anthem BC/BS, will use the low rate, as well as the 2 next highest.

Carrier Codes:

Code	Short Description	Long Description
09F	BLUEGRASS	BLUEGRASS FAMILY HEALTH This code is used for employees who can choose the BLUEGRASS FAMILY HEALTH option receiving a state contribution of \$269.44.
09G	BLUEGRASS	BLUEGRASS FAMILY HEALTH This code is used for employees who can choose the BLUEGRASS FAMILY HEALTH option receiving a state contribution of \$278.76.
09H	BLUEGRASS	BLUEGRASS FAMILY HEALTH This code is used for employees who can choose the BLUEGRASS FAMILY HEALTH option receiving a state contribution of \$292.00.
10F	CHA HEALTH	CHA HEALTH This code is used for employees who can choose the CHA HEALTH option receiving a state contribution of \$269.44.
14F	HUMANA PPO	HUMANA PPO/EPO This code is used for employees who can choose the HUMANA PPO/EPO option receiving a state contribution of \$269.44.
14G	HUMANA PPO	HUMANA PPO/EPO This code is used for employees who can choose the HUMANA PPO/EPO option receiving a state contribution of \$278.76.
14H	HUMANA PPO	HUMANA PPO/EPO This code is used for employees who can choose the HUMANA PPO/EPO option receiving a state contribution of \$292.00.
15F	HUMANA HMO	HUMANA HMO This code is used for employees who can choose the HUMANA HMO option receiving a state contribution of \$269.44.
15G	HUMANA HMO	HUMANA HMO This code is used for employees who can choose the HUMANA HMO option receiving a state contribution of \$278.76.
15H	HUMANA HMO	HUMANA HMO This code is used for employees who can choose the

		HUMANA HMO option receiving a state contribution of \$292.00.
16F	HUMANA POS	HUMANA POS This code is used for employees who can choose the HUMANA POS option receiving a state contribution of \$269.44.
16G	HUMANA POS	HUMANA POS This code is used for employees who can choose the HUMANA POS option receiving a state contribution of \$278.76.
16H	HUMANA POS	HUMANA POS This code is used for employees who can choose the HUMANA POS option receiving a state contribution of \$292.00.
33F	ANTH BC/BS	ANTHEM BC/BS OPT 2000 This code is used for employees who can choose the ANTHEM 2000 option receiving a state contribution of \$278.76.
33G	ANTH BC/BS	ANTHEM BC/BS OPT 2000 This code is used for employees who can choose ANTHEM 2000 option receiving a state contribution of \$292.00.
33H	ANTH BC/BS	ANTHEM BC/BS OPT 2000 This code is used for employees who can choose ANTHEM 2000 option receiving a state contribution of \$397.08.

WARNING: All flex spending contributions will be calculated on the State Contribution of **\$234.00.**

Checklist for Entering Employees into the Health Insurance System During Open Enrollment

Each step below is described in more detail in the document **Health Insurance Open Enrollment (PR-PER-7)**.

- ☐ 1. Verify that all preparation steps in the Setting Up Health Insurance Checklist have been completed. In particular, add any new health insurance vendors and corresponding Master Deduction Numbers. Also, verify the Health Insurance Parameter Table and Insurance Rate Table.
- ☐ 2. Global-Copy Health Insurance Enrollment records from last year to the new plan year.
- ☐ 3. Update Health Insurance Enrollment records for employees whose health insurance coverage has changed from last year.

NOTE: Pay particular attention to employee's who currently have a plan that is not available in the Plan Year 2003.

- ☐ 4. Add Health Insurance Enrollment records for new employees not previously in the Health Insurance System.
- ☐ 5. Delete Health Insurance Enrollment records for all 2002 employee records that have terminated or who are no longer eligible for Health Insurance. Perform this when the last payroll has been completed for last year's rate.
- ☐ 6. Generate reports for Health Insurance Enrollment Verification.

NOTE: Pay close attention to the flex spending contributions on all reports, especially the Advice of Coverage which is given to employees for review. The flex spending contributions will be incorrect on these reports until the new enhancement is available.

- ☐ 7. Make any necessary changes to errors found on the report and re-print the reports to verify the changes.

Do not complete the following step until all employee insurance information has been entered and verified as described above and the last payroll has been completed for last year's rate.

- ☐ 8. Create employee health insurance deductions. **(Z-UPDATE)**

Note to Escrow Districts:

See Transferring Escrow Balances section in the *Health Insurance Open Enrollment (PR-PER-7)* document.